Tourism Sales Market Update

Presented by:
Broward County Aviation Department
September 20, 2019
Agenda

• FLL Today – Airport Overview
• “By the Numbers”
• Domestic and International Air Service Portfolio
• Delivering a Better Guest Experience
• Master Plan at a Glance
• Q&A
Airport Overview

• Passenger Terminal Complex
  • 4 Terminals/7 concourses - 64 air carrier gates
  • 3 Parking Garages
  • 2 Parallel air carrier runways
  • 30 Airlines
  • 2 New FIS facilities
  • 100 New food and retail concessions

• On-Airport Rental Car Facility
  • All major rental car companies
  • Minutes away from the terminals
  • Convenient shuttle service

• FLL’s Top Three Airlines
  • 65% of FLL’s passengers
  • No dominant carrier
  • Low cost carriers keep air fares down
    (FLL’s domestic base fare is the lowest among Large Hub U.S. airports*)

*U.S. DOT Origin/Destination Data
“By the Numbers”

- In 2018, FLL was the fastest growing Large Hub airport in the U.S. with 35.9M passengers, up 10.6%. (Airports Council International ((ACI)) data)

- 2019 Jan-Aug total traffic was 25.3M, up 2.5%.

- According to Airports Council International data, FLL ranks
  - 18th in total passenger traffic.
  - 10th in international passengers, more than Phoenix, Salt Lake City, LaGuardia, Washington National and Detroit…..combined.

- FLL has had 5 consecutive years of double digit growth in international traffic.

- 84% of FLL’s passengers begin or end their flight here.

- Due to Hurricane Dorian, there were 1,164 flight cancelations from Aug 31-Sep 6. That’s a loss of approximately 180,000 seats which equates to about 153,000 passengers.
FLL is the 18th Busiest Large Airport in the U.S (ACI Data Jan-Jul 2019)
FLL Ranks 10th in International Traffic (ACI Data Jan-Jul 2019)
“By the Numbers”

Busy Season Scheduled Seat Comparison

<table>
<thead>
<tr>
<th>Quarter</th>
<th>International</th>
<th>Domestic</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q4 2018</td>
<td>1.6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4 2019</td>
<td>7.6%</td>
<td></td>
<td>5.3%</td>
</tr>
<tr>
<td>Q1 2019</td>
<td>10.4%</td>
<td></td>
<td>3.6%</td>
</tr>
<tr>
<td>Q1 2020</td>
<td>6.8%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Reductions by Norwegian and the departure of BA equate to the loss of over 2,000 international seats daily
- Canadian seats up 12.4% for Q4/2019 and 13.3% for Q1/2020
Passenger traffic has increased by over 13M passengers since 2013, up 57%.
Domestic Air Service

- Domestic Service (Sept 2019)
- 10 Airlines
- 74 Unique Destinations
- 240 Average Daily Departures
International Air Service

International Service (Sept 2019)

21 Airlines
54 Unique Destinations in 32 Countries
86 Average Daily Departures
Air Service…so far in 2019

Daytona Beach (Jan)
Pensacola (Feb)
Guayaquil (Feb)
Phoenix (Feb)
St. Maarten (Feb)
St. Johns (Mar)
Vancouver (Dec)
Raleigh Durham (May)
Jacksonville (Feb)
Austin (Feb)
Charlotte (Jun)
Denver (Mar)
Cleveland (Oct)
Nashville (Oct)
Cincinnati (Oct)
Philadelphia (Nov)
Raleigh Durham (May)
Charlotte (Jun)
Jacksonville (Feb)
Denver (Mar)
Cleveland (Oct)
Nashville (Oct)
Cincinnati (Oct)
Philadelphia (Nov)
Raleigh Durham (May)
Charlotte (Jun)

Belo Horizonte (Dec)
## FLL’s Top Markets

### Top 20 Domestic and International O/D Markets
**CY 2018**

<table>
<thead>
<tr>
<th>Domestic</th>
<th>% Share</th>
<th>International</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newark, NJ, US</td>
<td>6.4%</td>
<td>Toronto, ON, CA</td>
<td>6.9%</td>
</tr>
<tr>
<td>New York-La Guardia, NY, US</td>
<td>5.7%</td>
<td>Montreal-PET, QC, CA</td>
<td>6.8%</td>
</tr>
<tr>
<td>Atlanta, GA, US</td>
<td>5.1%</td>
<td>Nassau, BS</td>
<td>6.2%</td>
</tr>
<tr>
<td>New York-JFK, NY, US</td>
<td>4.4%</td>
<td>Port Au Prince, HT</td>
<td>5.6%</td>
</tr>
<tr>
<td>Baltimore, MD, US</td>
<td>4.3%</td>
<td>Kingston, JM</td>
<td>4.0%</td>
</tr>
<tr>
<td>Boston, MA, US</td>
<td>3.6%</td>
<td>Havana, CU</td>
<td>3.5%</td>
</tr>
<tr>
<td>Chicago-O'Hare, IL, US</td>
<td>3.5%</td>
<td>Montego Bay, JM</td>
<td>3.5%</td>
</tr>
<tr>
<td>Philadelphia, PA, US</td>
<td>3.2%</td>
<td>San Jose, CR</td>
<td>3.4%</td>
</tr>
<tr>
<td>Detroit, MI, US</td>
<td>3.2%</td>
<td>Cancun, MX</td>
<td>3.1%</td>
</tr>
<tr>
<td>Los Angeles, CA, US</td>
<td>2.4%</td>
<td>Santo Domingo, DO</td>
<td>2.8%</td>
</tr>
<tr>
<td>San Juan, PR, US</td>
<td>2.3%</td>
<td>Bogota, CO</td>
<td>2.7%</td>
</tr>
<tr>
<td>Denver, CO, US</td>
<td>2.0%</td>
<td>London-Gatwick, EN, GB</td>
<td>2.3%</td>
</tr>
<tr>
<td>Washington-National, DC, US</td>
<td>2.0%</td>
<td>Mexico City, MX</td>
<td>2.0%</td>
</tr>
<tr>
<td>Dallas/Fort Worth, TX, US</td>
<td>2.0%</td>
<td>Port of Spain, TT</td>
<td>1.8%</td>
</tr>
<tr>
<td>Hartford, CT, US</td>
<td>1.7%</td>
<td>Punta Cana, DO</td>
<td>1.6%</td>
</tr>
<tr>
<td>Nashville, TN, US</td>
<td>1.6%</td>
<td>Quito, EC</td>
<td>1.5%</td>
</tr>
<tr>
<td>Las Vegas, NV, US</td>
<td>1.6%</td>
<td>Guayaquil, EC</td>
<td>1.4%</td>
</tr>
<tr>
<td>San Francisco, CA, US</td>
<td>1.6%</td>
<td>Medellin, CO</td>
<td>1.3%</td>
</tr>
<tr>
<td>Chicago-Midway, IL, US</td>
<td>1.5%</td>
<td>Paris-De Gaulle, FR</td>
<td>1.3%</td>
</tr>
<tr>
<td>New Orleans, LA, US</td>
<td>1.5%</td>
<td>Cartagena, CO</td>
<td>1.3%</td>
</tr>
</tbody>
</table>

### NY Metro Area 16.5%
- Baltimore/Wash 8.3%
- Chicago 5.0%

### Percentages of Travel
- Canada 19.5%
- Bahamas 9.0%
- Jamaica 7.5%
- Colombia 6.0%
- Cuba 5.9%
- Haiti 5.6%
- Mexico 5.6%
- Dominican Republic 5.5%
- Brazil 3.9%
- Costa Rica 3.5%
FLL’s Top Airlines

Top 10 Airlines Market Share
Jan-Jul 2019

- JetBlue: 23.3%
- Spirit: 22.0%
- Southwest: 20.3%
- Delta: 10.2%
- United: 6.1%
- American: 5.2%
- Air Canada: 2.6%
- Allegiant: 2.8%
- Silver: 1.1%
- Alaska: 1.1%
- Other: 5.6%
FLL’s Top Target Markets

Tallahassee

Buenos Aires

Santiago

Hong Kong

Shanghai

Guangzhou

Frankfurt

London

Madrid

Rome

Tokyo
Delivering a Better Guest Experience
Through New and Renovated Facilities
T1  Concourse A  $376 Million
T2  Terminal Connectors  $149 Million
T3  Terminal 3  $257 Million
T4  Terminal 4  $688 Million
B/C Connector  $250
Future 5 Gate Facility  $250
South Runway  $826 Million

Part of a $3.2 billion airport expansion/development program
Delivering a Better Guest Experience

Terminal 1 Modernization

Concourse A

B/C Connector
Delivering a Better Guest Experience

B/C Connector – Airside
Delivering a Better Guest Experience

Terminal 2 Modernization
Delivering a Better Guest Experience

Terminal 2
Modernization
Delivering a Better Guest Experience

Terminal 3 Modernization

Broward County Public Art Project

“Rainbow’s End”
Delivering a Better Guest Experience

Terminal 3 Future Connector
Delivering a Better Guest Experience

Terminal 4 Concourse G
Delivering a Better Guest Experience

Terminal 4 Modernization

Concourse G East

New International Meet/Greet Lobby
Opening Later this Year
Delivering a Better Guest Experience

Through Innovation, Great Shops, and Customer Focus

- User Friendly Website
- Easy to Navigate
- Curbside Valet Parking
- Delicious Dining Choices
- Super Shopping
- Friendly Service
- Innovative Technology

FREE WiFi AVAILABLE

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Thank You

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